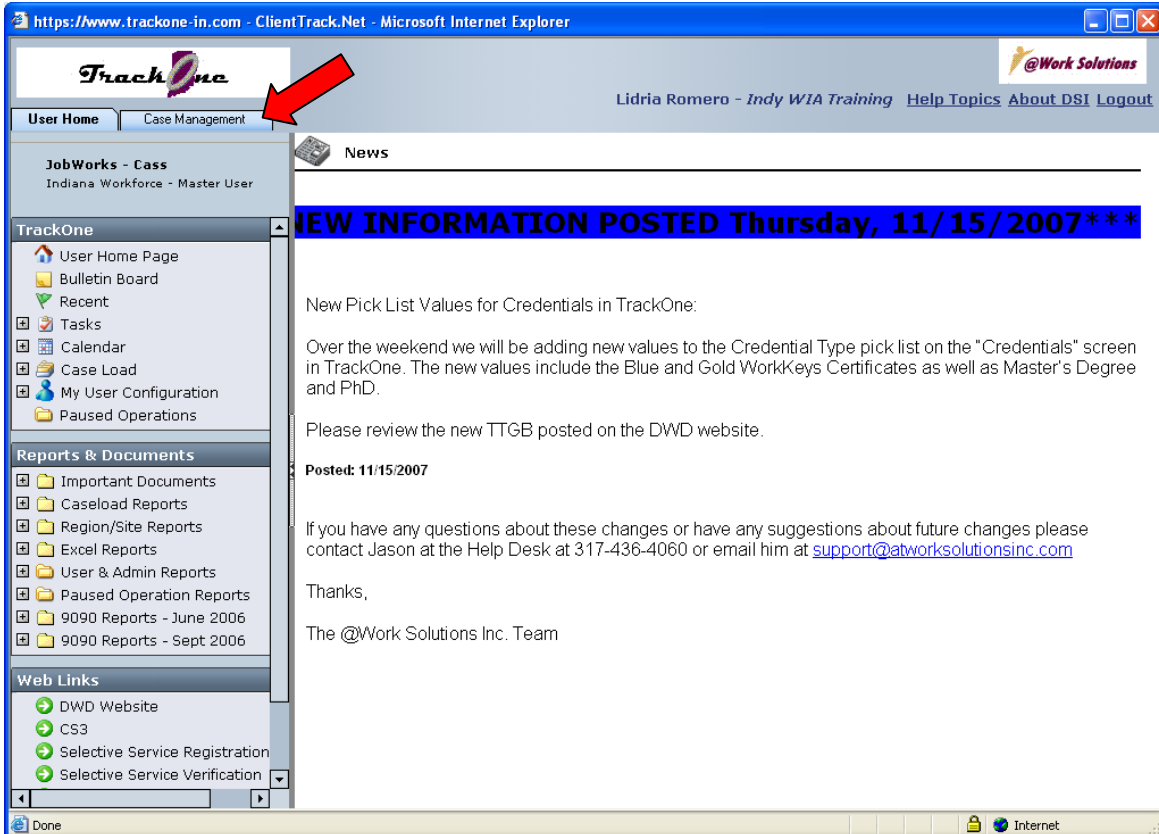
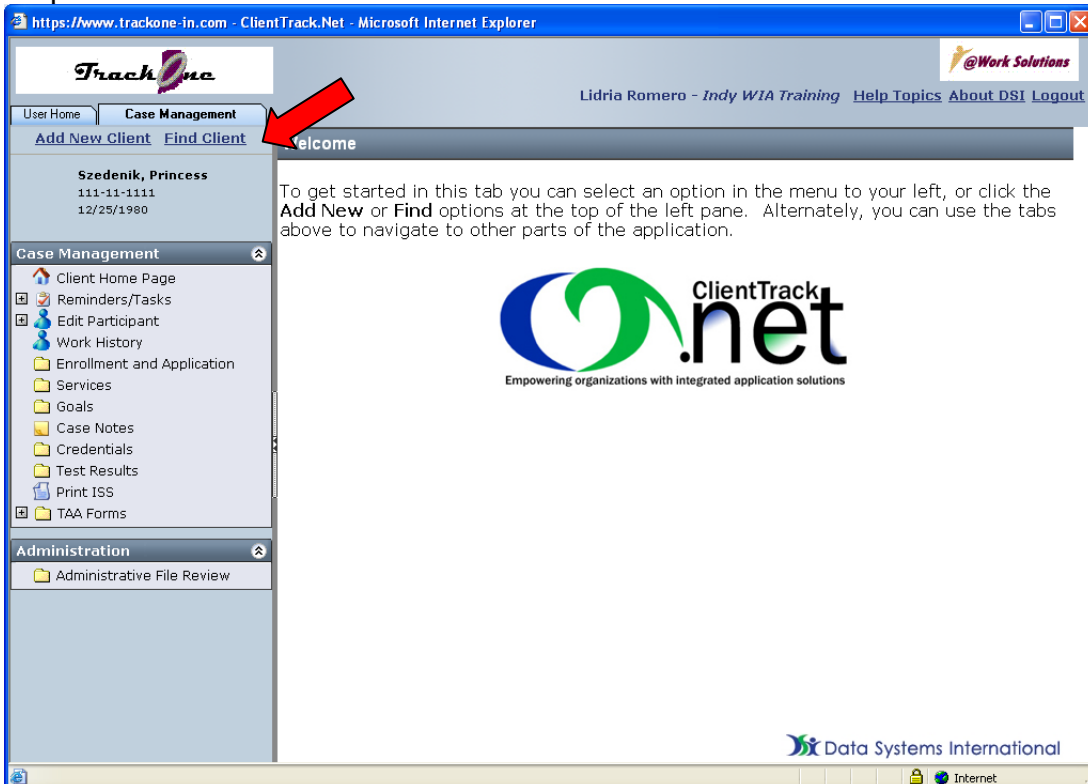


ADDENDUM 1A

A. Track One History Check**Step 1: Click Case Management****Step 2: Click Find Client**

Step 3: In “Find Client” Screen, Enter Last Name, First Name and click search. (If not in system, you will need to add new client)

TrackOne

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

Mary Urban - Indy WIA Help Topics About DSI Logout

User Home Case Management

Add New Client Find Client

Bading, Frank
110-60-7845
5/10/1964

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File Review

Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. Social Security Number and Birth Date are the best fields to narrow your search.

Last Name:

First Name:

Social Security Number:

Birth Date:

Scan Card ID:

Search Cancel

Step 4: Name will appear in the bottom portion of the screen is the customer is registered in TrackOne. Since several names may be listed, match the SS# with the name to verify the customer is already entered into TrackOne

TrackOne

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

Lidria Romero - Indy WIA Training Help Topics About DSI Logout

User Home Case Management

Add New Client Find Client

Szedenik, Princess
111-11-1111
12/25/1980

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File Review

Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. Social Security Number and Birth Date are the best fields to narrow your search.

Last Name:

First Name:

Social Security Number:

Birth Date:

Scan Card ID:

Search Cancel

1 records found.

Last Name	First Name	Social Security Number	Birth Date	Gender	City	Home Phone	Scan Card ID
Szedenik	Princess	111-11-1111	12/25/1980	Female	Mishawaka	574-233-6175	

B. Add New Client into Track One

Step 1: Click add new client (This will take you to the participant identification screen)

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

Mary Urban - Indy WIA Help Topics About DSI Logout

User Home Case Management

Add New Client Find Client

Bading, Frank
110-60-7845
5/10/1964

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File Review

Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. Social Security Number and Birth Date are the best fields to narrow your search.

Last Name:

First Name:

Social Security Number:

Birth Date:

Scan Card ID:

Search Cancel

Step 2: Enter Last name, First name, SS#, Birth date, Click Next

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

Mary Urban - Indy WIA Help Topics About DSI Logout

User Home Case Management

Add New Client Find Client

Bading, Frank
110-60-7845
5/10/1964

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
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Administration

- Administrative File Review

Participant Identification

Fill in the information to identify your participant in the boxes below.

- If you are adding a new participant, complete the required fields before clicking Next.
- If you want to check to make sure that your participant does not already exist in the system, type some identifying information such as social security number, or the first few letters of the participant's last name, and click Next.

Last Name:*

First Name:*

Social Security Number:*

Birth Date:

Next Pause Cancel

Step 3: 10 Demographics (Some data may already be entered) Continue with Employment Status, Veteran Status, Birth date, Gender, Disabled Yes/No, Hispanic/Latino Ethnicity, Race, Home Address, Zip Code, City, State, County, Home #, Cell# optional, email optional, Highest grade completed, Highest Degree attained, UI status, citizenship.

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

User Home **Case Management** Lidria Romero - Indy WIA Training Help Topics About DSI Logout

[Add New Client](#) [Find Client](#)

Szednik, Princess
111-11-1111
12/25/1980

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File Review

[Add New Client](#) [Find Client](#)

Szednik, Princess
111-11-1111
12/25/1980

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File Review

Participant Identification

Fill in the participant's primary identifying information

Universal/Core Services Participants-The following information is required

Last Name:*
First Name:*
Middle Name:
Suffix:
Social Security Number:*
Employment Status:* -- SELECT --
Laid off from TAA Certified Employer:
Location:
TAA Petition #:

Veteran Information

Veteran Status:* -- SELECT --
Separation Date:

Optional Fields-Participant must be offered the opportunity to provide Equal Employment/Demographic information. These fields are required for the application, but not required for Core Services. If available, please complete.

Birth Date:
Client Age:
Gender: -- SELECT --
Disabled: No
Hispanic/Latino Ethnicity: -- SELECT --

Race-If the client self-identified one or more of the race categories below, check all that apply. Otherwise, check Did Not Self-Identify Race.

American Indian/Alaskan Native: ☐
Asian: ☐
Black/African American: ☐
Hawaiian/Pacific Islander: ☐
White/Caucasian: ☐
Did Not Self-Identify Race: ☐

Additional Participant Information

Home Address:
Zip Code:
City:
State:
County: -- SELECT --
Home Phone:
Work Phone:
Msg Phone:
Cell Phone:
Email Address:
Highest Grade Completed: -- SELECT --
Highest Degree Attained: -- SELECT --
Unemployment Insurance (UI) Status: -- SELECT --
Citizenship: -- SELECT --

Org/Region Information-These values will be automatically assigned by the system

Created By Org ID:
Organization Name:
New Region Code:
Old WSA Code:
Date Created:

[Previous](#) [Finish](#) [Pause](#) [Cancel](#)

Done

C. First Service Step

Step 1: After 10 demographics are entered, click “Services” on left side of screen. This will then take you to Activities Screen.

The screenshot shows the ClientTrack.Net interface. The left sidebar has a 'Case Management' section with a 'Services' link highlighted by a red arrow. The main area displays the 'Additional Participant Information' form for a client named Bading, Frank. The form includes fields for Home Address, Zip Code, City, State, County, Home Phone, Work Phone, Msg Phone, Cell Phone, Email Address, Highest Grade Completed, Highest Degree Attained, Unemployment Insurance (UI) Status, and Citizenship. Below this is the 'Org/Region Information' section with fields for Created By Org ID, Organization Name, New Region Code, Old WSA Code, and Date Created. The bottom of the form has buttons for Previous, Finish, Pause, and Cancel.

Step 2: To add a new service, click the add new button this will take you to the activity screen

The screenshot shows the ClientTrack.Net interface with the 'Activities' screen. The left sidebar has a 'Case Management' section with a 'Services' link highlighted by a red arrow. The main area displays the 'Activities' section for a client named Szedenik, Princess. It includes a table of activities and an 'Add New' button. The table has columns for Begin Date, Title, Funding Stream, Service Type, Line Code, Planned End Date, and Actual End Date. The 'Add New' button is highlighted by a red arrow.

Begin Date	Title	Funding Stream	Service Type	Line Code	Planned End Date	Actual End Date
1/30/2008	Work w/ client to develop job search plan	WIA-Adult	Employment Plan	N2	1/30/2008	
11/9/2007	1-on-1 Counseling and Career Planning	WIA-Adult	Counseling and Career Planning	N4	11/9/2007	11/9/2007
11/9/2007	Self-help - Assessment - Generic	Core Services	Informational/Self-Service	C9	11/9/2007	11/9/2007

Step 3: At the “Add an Activity” page, click the magnifying glass next to Activity/Service Title, this will take you to available service by funding stream screen.

The screenshot shows the 'Add an Activity' page in the TrackOne ClientTrack.Net application. The left sidebar contains navigation links for 'User Home', 'Case Management', and 'Administration'. The main content area is titled 'WIA Activities-Master' and 'Activity'. It contains a form with the following fields: 'Begin Date' (02/01/2008), 'Activity/Service Title' (with a magnifying glass icon), 'Funding Stream', 'Line Code', 'Service Type', 'Provider', 'Training Provider ID', 'O*Net Code', 'O*Net Title', 'Summary Description', 'Status' (Active), 'Planned End Date' (02/01/2008), 'Actual End Date', and 'Record Created By'. A 'Service Notes' field is at the bottom. A red arrow points to the magnifying glass icon next to the 'Activity/Service Title' field.

Step 4: In “Category” select “1 Core-Self Service”, in the drop down menu under “Service Type”, choose “Informational/Self-Service.”

The screenshot shows the 'Available Services By Funding Stream' search window. The window title is 'Available Services By Funding Stream'. It contains a search form with the following fields: 'Funding Stream' (SELECT), 'Category' (1 Core-Self Service), 'Service Type' (Informational/Self-Service), and 'Service Title'. There are 'Search' and 'Cancel' buttons. The window also includes instructions: 'Select the Funding Stream (only the ones for which this client is currently eligible are shown), and click Search to display a list of available services. You can use the Category and Service Type selections to narrow the search. The Service Title box will match all titles containing the text in the box, for the selected Funding Stream. Click on an item in the list to place the client into the selected service.'

Step 5: Click “Search.” A page displaying “Available services by funding stream” should show. **Note:** There are various Core-Self Help C9’s that may be selected (select most appropriate).

Available Services By Funding Stream

Select the **Funding Stream** (only the ones for which this client is currently eligible are shown), and click **Search** to display a list of available services. You can use the Category and Service Type selections to narrow the search. The Service Title box will match all titles containing the text in the box, for the selected Funding Stream.

Click on an item in the list to place the client into the selected service.

Funding Stream: * -- SELECT --
 Category: 1 Core - Self-Service
 Service Type: Informational/Self-Service
 Service Title:

24 records found.

Funding Stream	Service Type	Service Title	Line Code
WIA-Adult	Informational/Self-Service	Self-help - Utilized Tutorials (Typing/Office/etc)	C9
WIA-Adult	Informational/Self-Service	Self-help - Job Search - Generic	C9
WIA-Adult	Informational/Self-Service	Self-help - Utilized Job Search software/video/pri	C9
WIA-Adult	Informational/Self-Service	Self-help - Utilized resume builder software/video	C9
WIA-Adult	Informational/Self-Service	Self-help - Financial Aid Information	C9
WIA-Adult	Informational/Self-Service	Self-help - Community Resource Information	C9
WIA-Adult	Informational/Self-Service	Self-help - LMI - Generic	C9
WIA-Adult	Informational/Self-Service	Accessed local wage and benefits trends	C9
WIA-Adult	Informational/Self-Service	Accessed LMI for region's strat. skills initiative	C9
WIA-Adult	Informational/Self-Service	Self-help - Assessment - Generic	C9
WIA-Adult	Informational/Self-Service	Self-help - Utilized typing test software	C9
WIA-Adult	Informational/Self-Service	Self-help - Utilized Interest Inventory Software	C9
Core Services	Informational/Self-Service	Self-help - Utilized Tutorials (Typing/Office/etc)	C9
Core Services	Informational/Self-Service	Self-help - Job Search - Generic	C9
Core Services	Informational/Self-Service	Self-help - Utilized Job Search software/video/pri	C9
Core Services	Informational/Self-Service	Self-help - Utilized resume builder software/video	C9
Core Services	Informational/Self-Service	Self-help - Financial Aid Information	C9
Core Services	Informational/Self-Service	Self-help - Community Resource Information	C9
Core Services	Informational/Self-Service	Self-help - LMI - Generic	C9
Core Services	Informational/Self-Service	Accessed local wage and benefits trends	C9
Core Services	Informational/Self-Service	Accessed LMI for region's strat. skills initiative	C9
Core Services	Informational/Self-Service	Self-help - Assessment - Generic	C9

Step 6: After selecting most appropriate C9 service, TrackOne will go back to the “Activity” page. Some entries may be automatically filled in, but you must complete all other asterisked items and then click “Save” button on bottom of page.

TrackOne

Lidria Romero - Indy WIA Training Help Topics About DSI Logout

User Home Case Management

Add New Client Find Client

Szedenk, Princess
111-111-1111
12/25/1900

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File Review

WIA Activities-Master

Activity

To add an activity, enter the following information.

Begin Date: * 02/01/2008

Activity/Service Title:

Funding Stream:

Line Code:

Service Type:

Provider:

Training Provider ID:

O*Net Code:

O*Net Title:

Summary Description:

Status: * Active

Planned End Date: * 02/01/2008

Actual End Date:

Record Created By:

Service Notes-A notes field is provided for any justification, rationale or detailed information necessary for monitoring purposes. Please use accordingly. Notes in this field will be viewable by all users.

Service Notes:

Historical Data

O*Net Code (read-only):

Client Intake Site:

Provider Name:

Case Mgr Name:

Office Name:

WSA:

Total Hours:

Total Obligated:

Total Expended:

Created Date:

D. Work History

Step 1: Click on “Work history” to enter Work History. The page below should display. To enter work history, begin by either typing in the employer name (if you know it already exists in TrackOne) and click “next” or hit the magnifying glass next to “Employer Name” to refine search or enter new employer name.

The screenshot shows the TrackOne web application interface. The browser address bar displays <https://www.trackone-in.com> - ClientTrack.Net - Microsoft Internet Explorer. The user is logged in as Lidria Romero - Indy WIA Training. The sidebar on the left contains navigation links under 'Case Management' and 'Administration'. The 'Work History' link is highlighted with a red arrow. The main content area is titled 'Work History - Employer Info' and includes a progress bar with 'Step 1' and 'Step 2'. The form prompts the user to 'Identify the current or prior employer for the client by typing in the employer information or selecting a local employer using the lookup.' The form fields include 'Employer Name:*' (with a magnifying glass icon), 'Address:', 'Zip Code:', 'City:', 'State:', and 'Phone:'. There are 'Next', 'Pause', and 'Cancel' buttons at the bottom right.

Step 2: If Magnifying glass was clicked, the page below displays. Enter in Employer information to find or, if employer is new, then click the “Add New” button after information is entered

The screenshot shows the TrackOne web application interface. The browser address bar displays <https://www.trackone-in.com> - ClientTrack.Net - Microsoft Internet Explorer. The user is logged in as Lidria Romero - Indy WIA Training. The sidebar on the left contains navigation links under 'Case Management' and 'Administration'. The 'Work History' link is highlighted. The main content area is titled 'Find Employer' and includes a progress bar with 'Step 1' and 'Step 2'. The form prompts the user to 'Use the selection criteria below to find the desired employer.' The form fields include 'Employer Name:*' (with a magnifying glass icon), 'Employer:', 'Zip Code:', 'Tax ID:', 'Address:', 'Phone:', 'City:' (with a dropdown menu), and 'State:'. There are 'Add New', 'Search', and 'Cancel' buttons at the bottom right.

Step3: If “Add New” was clicked, TrackOne will begin a 3-Step process to enter in the employer’s information. Click “Finish” when information is completed.

The screenshot shows a web browser window titled "https://www.trackone-in.com - Employer Information - Microsoft Internet Explorer". The page is titled "Employer Information" and indicates "Step 1" of a 3-step process. The instructions state: "Enter the following information to create a new Employer in the system." The form contains the following fields: "Employer:" (required), "Alternate Employer Name:", "State Employer ID:", and "Status:" (a dropdown menu currently set to "Active"). There are "Next" and "Cancel" buttons. On the right side of the browser window, a sidebar shows a progress bar with "Step 1" selected, and a button labeled "Add New".

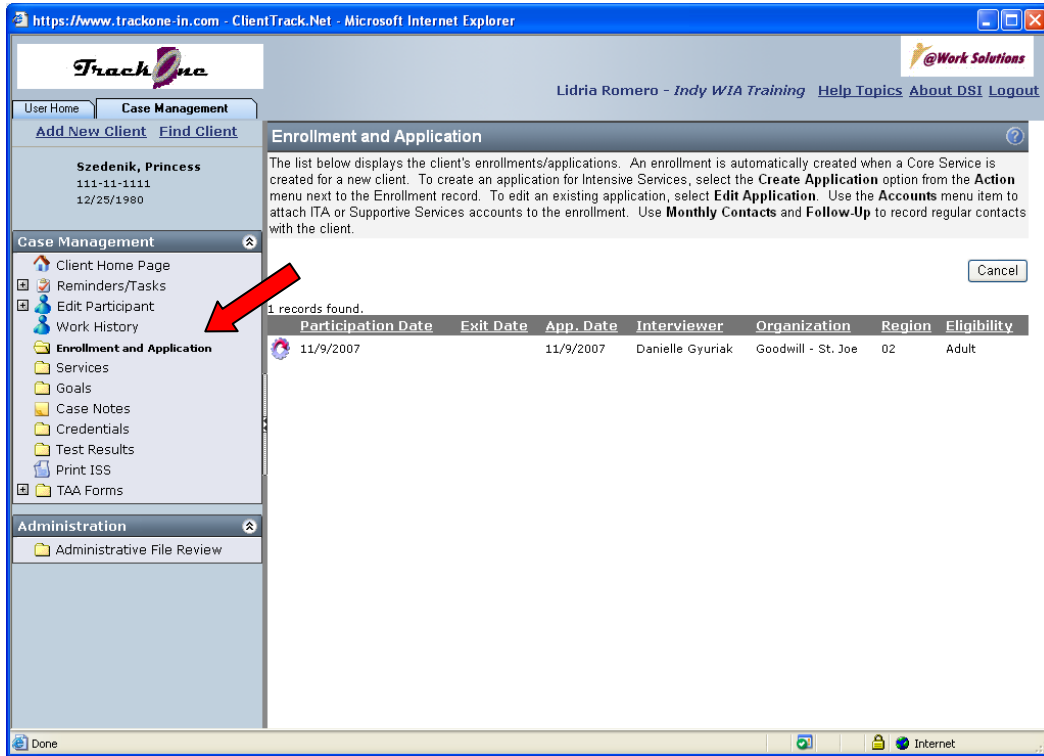
Step 4: After Employer information is entered, or if employer information was found in the initial search, the “Work History – Job Information” page displays. Click “Finish” when done completing fields.

The screenshot shows a web browser window titled "https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer". The page is titled "Work History - Job Information" and indicates "Step 2" of a 2-step process. The instructions state: "Fill in the information below regarding the client's job. The wage information is based on the wage the client was receiving at the time they started the job." The form contains the following fields: "Hourly Wage:" (required), "Average Weekly Hours:" (with a value of 40.00), "Job Title:" (required), "Description:", "Duties/Responsibilities:" (a large text area), "Job Start Date:" (required), "Job End Date:", "Reason Left:" (a dropdown menu), "Commission:", "Classification:" (a dropdown menu), "Contact Name:", "Contact Phone:", "Placement Type:" (a dropdown menu set to "Unsubsidized Employment"), "Benefits Available:" (a dropdown menu), "Job Covered by UI:" (a dropdown menu), and "OSNET Code:". On the left side, a sidebar shows a navigation menu with options like "Client Home Page", "Reminders/Tasks", "Edit Participant", "Work History", "Enrollment and Application", "Services", "Goals", "Case Notes", "Credentials", "Test Results", "Print ISS", "TAA Forms", and "Administration".

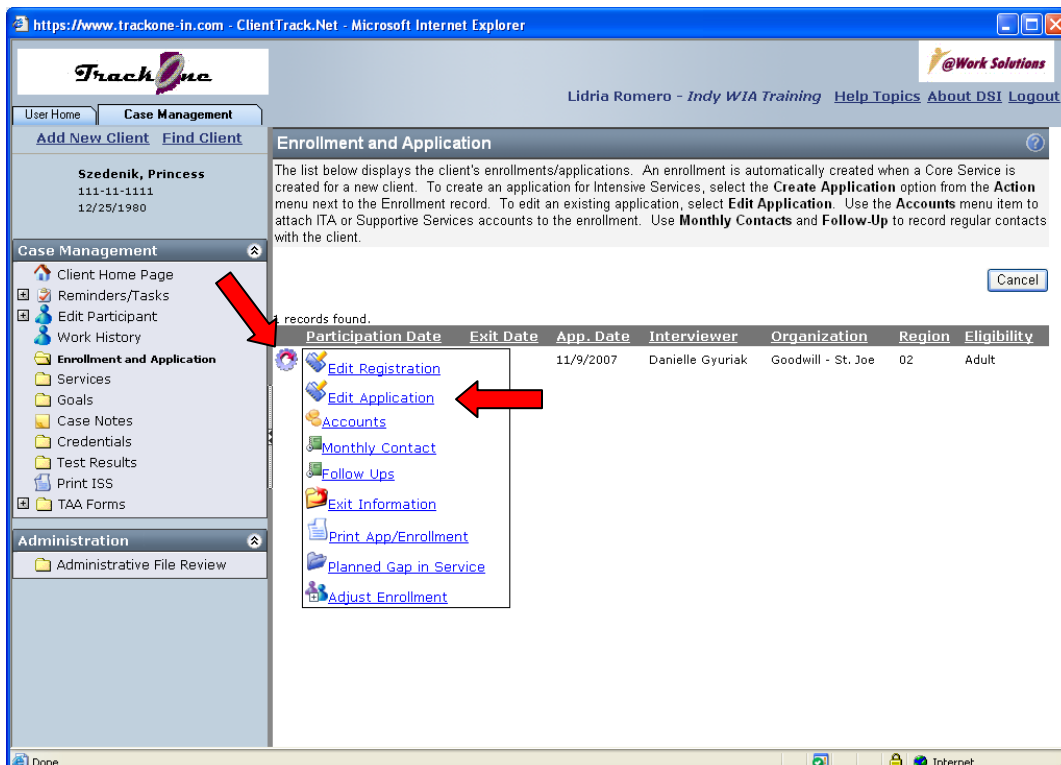
Step 5: After clicking “Finish”, TrackOne will revert back to “Client Work History” page where you can enter more Work History information or continue with procedure.

E. Track One Application

Step 1: Click enrollment and application folder on left, TrackOne will display the screen below



Step 2: Click on gear next to participation date, a drop-down menu appears. Click on “Edit Application”. This will take you to “Application-Basic Client Information Screen.”



Step 3: In “Application-Basic Client Information Screen”, all information must be entered. You will need to click the “Calculate Eligibility” button in order for TrackOne to calculate it. The screen will refresh to show eligibility. Click “Save” at the bottom of the screen.

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

Lidria Romero - Indy WIA Training Help Topics About DSI Logout

User Home Case Management

Add New Client Find Client

11/9/2007

Szednik, Princess
111-11-1111
12/25/1980

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
 - Services
 - Goals
 - Case Notes
 - Credentials
 - Test Results
 - Print ISS
 - TAA Forms

Administration

- Administrative File Review

111-11-1111
12/25/1980

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
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 - Services
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 - Case Notes
 - Credentials
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 - TAA Forms

Administration

- Administrative File Review

Application - Basic Client Information

Application Date:* 11/09/2007

Organization:* Goodwill - St. Joe

Applicant Information - Identify the following basic information about the applicant. If these values are empty, you must return to the edit client record to update

Name: Szednik, Princess

Address:* 1515 Beach Sand Lane

Zip Code:* 46545

City:* Mishawaka

State:* IN

County: St Joseph

Home Phone:* 574-233-6175

Birthdate:* 12/25/1980

Documented By: -- SELECT --

Age: 26

Gender: Female

Social Security Number: 111-11-1111

Documented By: Social Security Card

Citizenship:* U.S. Citizen

Documented By: Birth Certificate

Hispanic/Latino Ethnicity: No

American Indian/Alaskan Native: ☐

Asian: ☐

Black/African American: ☐

Hawaiian/Pacific Islander: ☐

White/Caucasian: ☒

Did Not Self-Identify Race: ☐

Selective Service Registration:* Not Required

Documented By: -- SELECT --

Application - Employment Information

Employment/Dislocation Information - Click on the Most Recent Job History search icon to select the current or most recent job held (and make sure the client's Work History is up to date). If applying for Dislocated Worker status, select the qualifying category from the Dislocated Worker drop-down list.

Most Recent Job History: A M General - CNC Machine Operator

Current Employment Status:* Not employed

Dislocated Worker Category:* ☒ Not Applicable (Not Eligible for Dislocated Worker)

☐ Terminated/Laid Off, Unlikely to Return to Previous Occupation

☐ Received Notice of Substantial Layoff/Plant Closure

☐ Was Self-Employed; Lost Work Due to Economic Conditions/Disaster

☐ Displaced Homemaker

Laid off from TAA Certified Employer:

Employer Location:

TAA Petition Number:

Unemployment Insurance:* Claimant - Not Profiled & Referred

Screens continue on next page:

Szedenk, Princess
111-11-1111
12/25/1980

Weeks Unemployed:* 2

Application - Other Client Information

Family Status: Other family member

Family/Income-Income information is required only for Youth seeking to qualify based on income. Fill in the information below, and the system will determine eligibility for Low Income status.

Number In Family: 5

Family Income for previous 6 Months:

Homeless: ☐

Foster Child: ☐

Food Stamps: No

TANF: ☐

General Assistance: ☐

Refugee Cash Assistance: ☒

SSI-SVA Title XVI: ☐

Low Income: True

Education Information-Please identify the level of the client's education. NOTE: For Youth Reading and Math assessment, go to Test Results on the Case Management menu to enter test scores.

Education Status (Required for Youth Only): -- SELECT --

Highest Grade Completed:* Bachelors Degree or Equivalent

Veteran Information-Indicate the applicant's veteran status by completing the following information

Veteran Status:* Yes - Served more than 180 days

Disabled Veteran:* Yes, Special disabled

Campaign Veteran:* Yes, Other Campaign

Recently Discharged Veteran: ☒

Separation Date:* 12/05/2004

Date Service Began:

Application - Barriers

Disabled:* No

Limited English: ☐

Substance Abuse: ☐

Poor Work History: ☐

TANF Exhaustee: ☐

Basic Skill Deficient: ☐

Offender: ☐

Pregnant/Parent Youth: ☐

Youth-Needs Assistance: ☐

Runaway: ☐

High School Dropout: ☐

Locally Defined Barrier: ☐

Local Barrier Description:

Application - Eligibility

Calculate Eligibility

A - Adult: ☒

B - Low Income Adult: ☒

D - Dislocated Worker: ☐

F - Youth (14 - 18): ☐

G - Youth (19 - 21): ☐

I - Youth (14 - 18) 5 Percent Window: ☐

J - Youth (19 - 21) 5 Percent Window: ☐

T - TAA: ☐

Combined WIA Eligibility Code: AB

Reviewer Information-Please select the interviewer and reviewer

Interviewer: Danielle Gyuriak

Interview Date: 11/09/2007

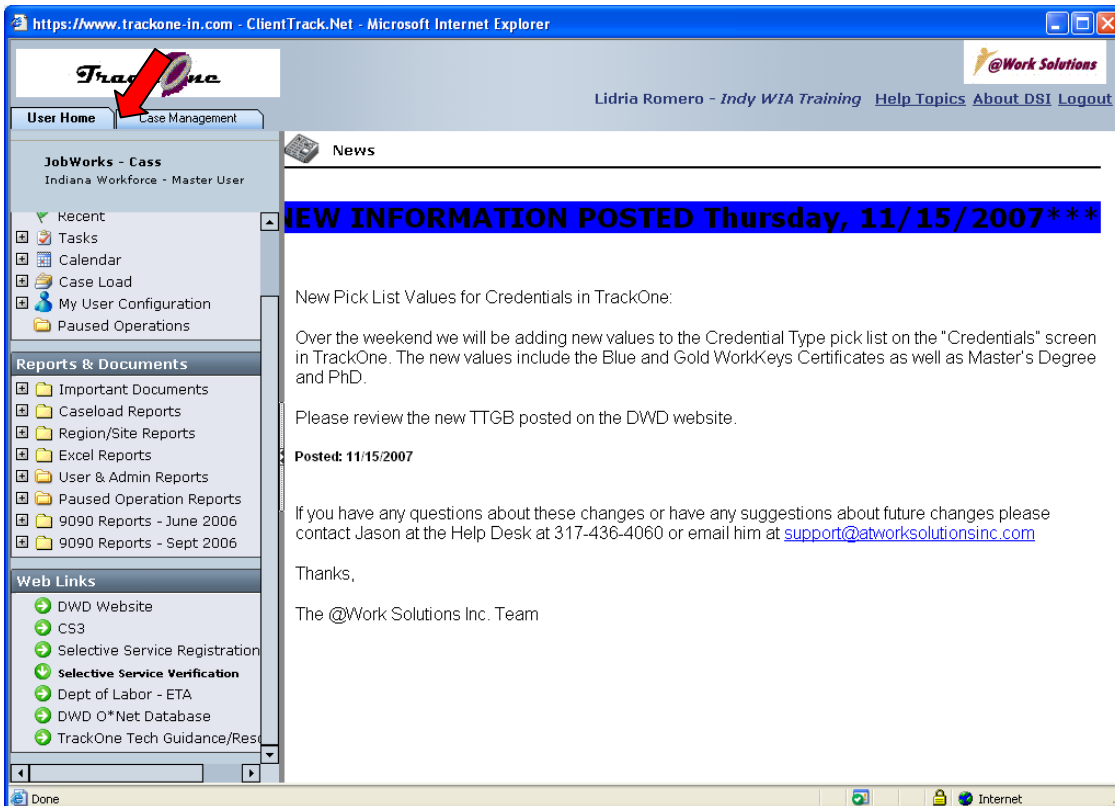
Reviewer:

Save Cancel

Selective Service Screen

The Selective Service website can be accessed directly from TrackOne

Step 1: In Track One click on user home tab.



Step 2: On the left side of the screen scroll down and click on Selective Service Registration. The screen below should show (if website is unavailable, registration can be completed by calling (847) 688-6888).



Step 3: You can then enter the customers SS# to verify if he is registered.

F. Recording the Results of the Initial Skills Indicator in TrackOne

Step 1: Click “Services” on left side of screen. This will take you to Activities Screen.

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

User Home Case Management Mary Urban - Indy WIA Help Topics About DSI Logout

Add New Client Find Client

Bading, Frank
110-60-7845
5/10/1964

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
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Administration

- Administrative File Review

Additional Participant Information

Home Address:

Zip Code:

City:

State:

County: -- SELECT --

Home Phone:

Work Phone:

Msg Phone:

Cell Phone:

Email Address:

Highest Grade Completed: -- SELECT --

Highest Degree Attained: -- SELECT --

Unemployment Insurance (UI) Status: -- SELECT --

Citizenship: -- SELECT --

Org/Region Information-These values will be automatically assigned by the system

Created By Org ID:

Organization Name:

New Region Code:

Old WSA Code:

Date Created:

Previous Finish Pause Cancel

Step 2: To add the Initial Skills Indicator results, click the “Add New” button. This will take you to the activity screen

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

User Home Case Management Lidria Romero - Indy WIA Training Help Topics About DSI Logout

Add New Client Find Client

Szedenik, Princess
111-11-1111
12/25/1980

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
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Administration

- Administrative File Review

Activities

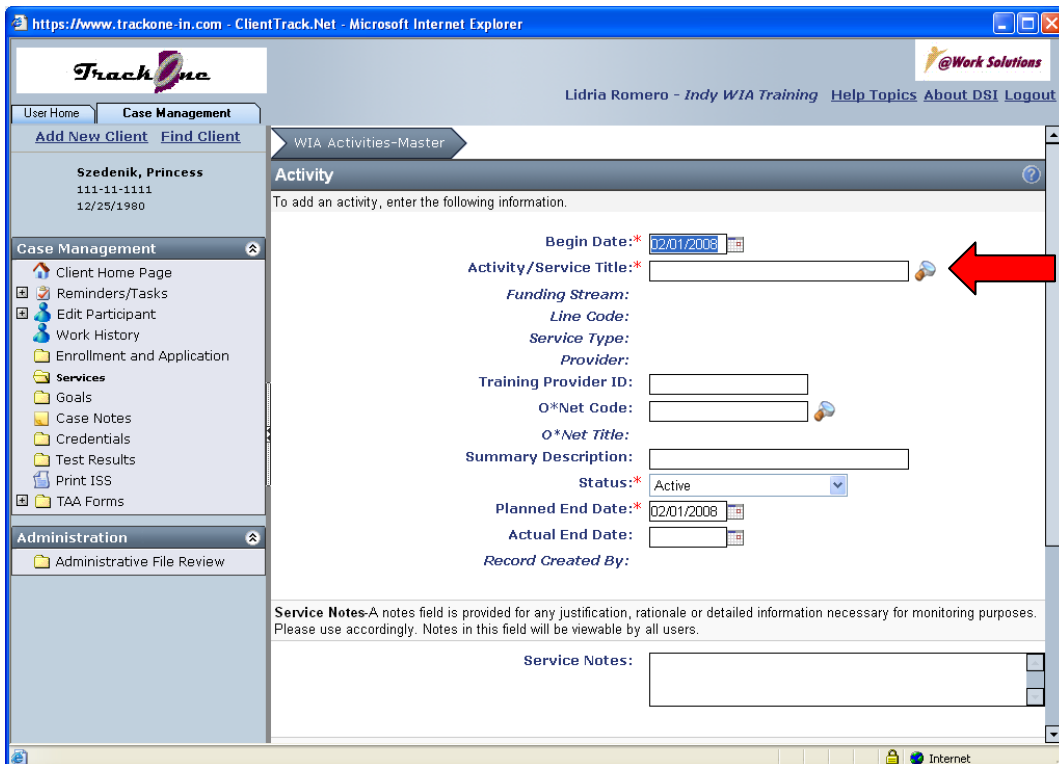
The client's activities/services are displayed below. The most recent items are listed first.
To add a new activity, click the **Add New** button. To edit an existing activity, click the Action icon next to the desired record and select **Edit** from the menu.

Add New Cancel

3 records found.

Begin Date	Title	Funding Stream	Service Type	Line Code	Planned End Date	Actual End Date
1/30/2008	Work w/ client to develop job search plan	WIA-Adult	Employment Plan	N2	1/30/2008	
11/9/2007	1-on-1 Counseling and Career Planning	WIA-Adult	Counseling and Career Planning	N4	11/9/2007	11/9/2007
11/9/2007	Self-help - Assessment - Generic	Core Services	Informational/Self-Service	C9	11/9/2007	11/9/2007

Step 3: At the “Add an Activity” page, click the magnifying glass next to “Activity/Service Title”, this will take you to “Available Service by Funding Stream” screen.



https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne

User Home | Case Management | Add New Client | Find Client

Szedenic, Princess
111-11-1111
12/25/1980

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration


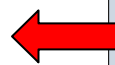
- Administrative File Review

WIA Activities-Master

Activity

To add an activity, enter the following information.

Begin Date*: 02/01/2008

Activity/Service Title*:  

Funding Stream:

Line Code:

Service Type:

Provider:

Training Provider ID:

O*Net Code:

O*Net Title:

Summary Description:

Status*: Active

Planned End Date*: 02/01/2008

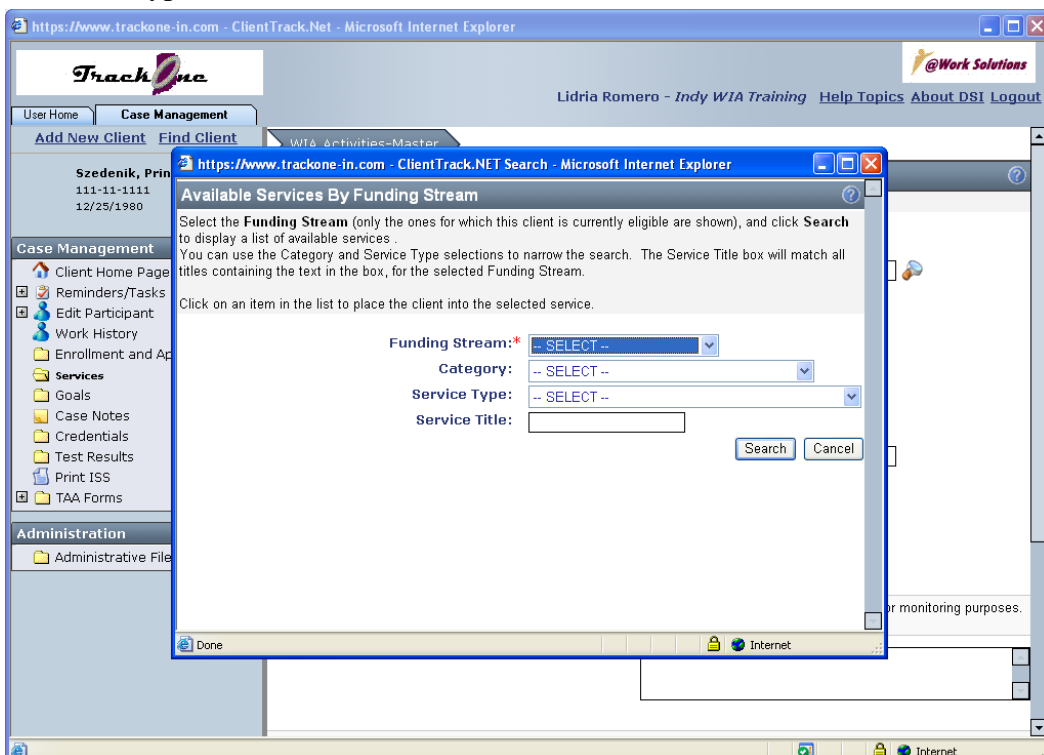
Actual End Date:

Record Created By:

Service Notes-A notes field is provided for any justification, rationale or detailed information necessary for monitoring purposes. Please use accordingly. Notes in this field will be viewable by all users.

Service Notes:

Step 4: In “Category” select “1 Core-Self Service”, in the drop down menu. Under “Service Type”, select “Informational/Self-Service.”



https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne

User Home | Case Management | Add New Client | Find Client

Szedenic, Prin
111-11-1111
12/25/1980

Case Management

- Client Home Page
- Reminders/Tasks
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- Enrollment and Ap
- Services
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File

WIA Activities-Master

Available Services By Funding Stream

Select the **Funding Stream** (only the ones for which this client is currently eligible are shown), and click **Search** to display a list of available services. You can use the **Category** and **Service Type** selections to narrow the search. The **Service Title** box will match all titles containing the text in the box, for the selected Funding Stream.

Click on an item in the list to place the client into the selected service.

Funding Stream*: -- SELECT --

Category: -- SELECT --

Service Type: -- SELECT --

Service Title:

Search Cancel

Step 5: Click “Search.” A page displaying “Available services by funding stream” should show. **Choose:** Informational/Self-Service – Self Help- Assessment- Generic”

Available Services By Funding Stream

Select the **Funding Stream** (only the ones for which this client is currently eligible are shown), and click **Search** to display a list of available services. You can use the Category and Service Type selections to narrow the search. The Service Title box will match all titles containing the text in the box, for the selected Funding Stream.

Click on an item in the list to place the client into the selected service.

Funding Stream: * -- SELECT --
 Category: 1 Core - Self-Service
 Service Type: Informational/Self-Service
 Service Title:

Search Cancel

24 records found.

Funding Stream	Service Type	Service Title	Line Code
WIA-Adult	Informational/Self-Service	Self-help - Utilized Tutorials (Typing/Office/etc)	C9
WIA-Adult	Informational/Self-Service	Self-help - Job Search - Generic	C9
WIA-Adult	Informational/Self-Service	Self-help - Utilized Job Search software/video/pri	C9
WIA-Adult	Informational/Self-Service	Self-help - Utilized resume builder software/video	C9
WIA-Adult	Informational/Self-Service	Self-help - Financial Aid Information	C9
WIA-Adult	Informational/Self-Service	Self-help - Community Resource Information	C9
WIA-Adult	Informational/Self-Service	Self-help - LMI - Generic	C9
WIA-Adult	Informational/Self-Service	Accessed local wage and benefits trends	C9
WIA-Adult	Informational/Self-Service	Accessed LMI for region's strat. skills initiative	C9
WIA-Adult	Informational/Self-Service	Self-help - Assessment - Generic	C9
WIA-Adult	Informational/Self-Service	Self-help - Utilized typing test software	C9
WIA-Adult	Informational/Self-Service	Self-help - Utilized Interest Inventory Software	C9
Core Services	Informational/Self-Service	Self-help - Utilized Tutorials (Typing/Office/etc)	C9
Core Services	Informational/Self-Service	Self-help - Job Search - Generic	C9
Core Services	Informational/Self-Service	Self-help - Utilized Job Search software/video/pri	C9
Core Services	Informational/Self-Service	Self-help - Utilized resume builder software/video	C9
Core Services	Informational/Self-Service	Self-help - Financial Aid Information	C9
Core Services	Informational/Self-Service	Self-help - Community Resource Information	C9
Core Services	Informational/Self-Service	Self-help - LMI - Generic	C9
Core Services	Informational/Self-Service	Accessed local wage and benefits trends	C9
Core Services	Informational/Self-Service	Accessed LMI for region's strat. skills initiative	C9
Core Services	Informational/Self-Service	Self-help - Assessment - Generic	C9

Step 6: After selecting, TrackOne will revert to the “Activity” page. Some entries may be automatically filled in, but you must complete all other asterisked items. **The Initial Skills Indicator Test Result is to be placed in the “Service Notes” of this page.** Click “Save”.

Activity

To add an activity, enter the following information.

Begin Date: * 02/01/2008
 Activity/Service Title:
 Funding Stream:
 Line Code:
 Service Type:
 Provider:
 Training Provider ID:
 O*Net Code:
 O*Net Title:
 Summary Description:
 Status: * Active
 Planned End Date: * 02/01/2008
 Actual End Date:
 Record Created By:

Service Notes-A notes field is provided for any justification, rationale or detailed information necessary for monitoring purposes. Please use accordingly. Notes in this field will be viewable by all users.

Service Notes:

Historical Data

O*Net Code (read-only):
 Client Intake Site:
 Provider Name:
 Case Mgr Name:
 Office Name:
 WSA:
 Total Hours:
 Total Obligated:
 Total Expended:
 Created Date:

Save Pause Cancel

G. Program Eligibility

Step 1: Click “Enrollment and Application” folder on left

The screenshot shows the ClientTrack.Net interface. On the left, under 'Case Management', the 'Enrollment and Application' folder is highlighted with a red arrow. The main content area displays the 'Enrollment and Application' section for client Szedenik, Princess (111-11-1111, 12/25/1980). It includes a table with 1 record found:

Participation Date	Exit Date	App. Date	Interviewer	Organization	Region	Eligibility
11/9/2007		11/9/2007	Danielle Gyuriak	Goodwill - St. Joe	02	Adult

Step 2: Click on gear next to participation date, click on “Edit Registration”.

The screenshot shows the same ClientTrack.Net interface. A red arrow points to the gear icon next to the participation date '11/9/2007' in the table. A dropdown menu is open, showing several options. A second red arrow points to the 'Edit Registration' link at the top of the dropdown menu.

Step 3: This will take you to the “Track One Registration Screen” shown below. You will enroll all customers in the WIA Adult and Wagner Peyser adult funding stream. Click “Save” at the bottom of screen.

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne

User Home Case Management

Add New Client Find Client

Szednik, Princess
111-11-1111
12/25/1980

11/9/2007

TrackOne Registration

Enrollment Categories-Select the WIA funding streams used to serve this participant.

WIA Adult: ☐

Dislocated Worker: ☐

WIA Youth: ☐

Rapid Response: ☐

National Emergency Grant (NEG): ☐

Trade Adjustment Act (TAA): ☐

Participation Dates-The first and last service dates are displayed below. If no services/activities occur for 90 days, the participant will be automatically exited as of the Last Service Date. If a Planned Gap in Service is in effect, no exit will occur before the 'Hold Open Until' date shown below.

Participation Date: 11/9/2007
Last Service Date: 1/30/2008
Hold Open Until:
Actual Exit Date:

TAA Tracking-This section for TAA program use ONLY.

TAA Application Date:

TAA Petition Number:

TAA Participant ID:

Eligible for ATAA: ☐

Training Waiver/Reason: -- SELECT --

Training Program ID:

Training Contract Review Date:

Total Cost of Training:

Total Expenses Paid by TAA:

Total Travel Expenses Paid:

Total Subsistence Expenses Paid:

Total Other Expenses Paid:

TAA Deregistration Notice: ☐

Other Federal Enrollment code:

TAA - Employment at Dislocation

Separation Date:

Annual Pay:

of Months Employed:

Recalled by Former Employer: ☐

Save Pause Cancel

Step 4: Customer will be attached to a Team (*TrackOne capability pending)

H. Record Initial Service

Step 1: Click “Services” on left side of screen this will then take you to “Activities” Screen.

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

User Home Case Management Mary Urban - Indy WIA Help Topics About DSI Logout

Add New Client Find Client

Bading, Frank
110-60-7845
5/10/1964

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services** (indicated by a red arrow)
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File Review

Additional Participant Information

Home Address:

Zip Code:

City:

State:

County: -- SELECT --

Home Phone:

Work Phone:

Msg Phone:

Cell Phone:

Email Address:

Highest Grade Completed: -- SELECT --

Highest Degree Attained: -- SELECT --

Unemployment Insurance (UI) Status: -- SELECT --

Citizenship: -- SELECT --

Org/Region Information-These values will be automatically assigned by the system

Created By Org ID:

Organization Name:

New Region Code:

Old WSA Code:

Date Created:

Previous Finish Pause Cancel

Step 2: Click the “Add New” button. This will take you to “Activity” Screen.

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

User Home Case Management Lidria Romero - Indy WIA Training Help Topics About DSI Logout

Add New Client Find Client

Szednik, Princess
111-11-1111
12/25/1980

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services**
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File Review

Activities

The client's activities/services are displayed below. The most recent items are listed first.
To add a new activity, click the **Add New** button. To edit an existing activity, click the Action icon next to the desired record and select **Edit** from the menu.

Add New Cancel

3 records found.

Begin Date	Title	Funding Stream	Service Type	Line Code	Planned End Date	Actual End Date
1/30/2008	Work w/ client to develop job search plan	WIA-Adult	Employment Plan	N2	1/30/2008	
11/9/2007	1-on-1 Counseling and Career Planning	WIA-Adult	Counseling and Career Planning	N4	11/9/2007	11/9/2007
11/9/2007	Self-help - Assessment - Generic	Core Services	Informational/Self-Service	C9	11/9/2007	11/9/2007

Step 3: Click the magnifying glass next to Activity/Service Title, this will take you to available service by funding stream.

The screenshot shows the 'WIA Activities-Master' form in the ClientTrack.Net application. The form is titled 'Activity' and includes instructions: 'To add an activity, enter the following information.' The fields are as follows:

- Begin Date:** 02/01/2008
- Activity/Service Title:** (Empty text box with a magnifying glass icon to its right, indicated by a red arrow)
- Funding Stream:** (Empty text box)
- Line Code:** (Empty text box)
- Service Type:** (Empty text box)
- Provider:** (Empty text box)
- Training Provider ID:** (Empty text box)
- O*Net Code:** (Empty text box)
- O*Net Title:** (Empty text box)
- Summary Description:** (Empty text box)
- Status:** Active (Dropdown menu)
- Planned End Date:** 02/01/2008
- Actual End Date:** (Empty text box)
- Record Created By:** (Empty text box)

Below the form, there is a section for **Service Notes** with a text area and a checkbox.

Step 4: Click drop-down menu for “Category” and select “3 Intensive-Significant Staff Assist.” Click “Search”.

The screenshot shows the 'Available Services By Funding Stream' search window. The window is titled 'Available Services By Funding Stream' and includes instructions: 'Select the Funding Stream (only the ones for which this client is currently eligible are shown), and click Search to display a list of available services. You can use the Category and Service Type selections to narrow the search. The Service Title box will match all titles containing the text in the box, for the selected Funding Stream. Click on an item in the list to place the client into the selected service.'

The search criteria are as follows:

- Funding Stream:** SELECT -- (Dropdown menu)
- Category:** -- SELECT -- (Dropdown menu, indicated by a red arrow)
- Service Type:** -- SELECT -- (Dropdown menu)
- Service Title:** (Empty text box)

Buttons for 'Search' and 'Cancel' are located at the bottom right of the search criteria section.

Step 5: This will then give you a list of intensive services to choose from. Select : 1-on-1 Career Counseling- Assessment Results Reviewed.”

https://www.trackone-in.com - ClientTrack.NET Search - Microsoft Internet Explorer

Available Services By Funding Stream

Select the **Funding Stream** (only the ones for which this client is currently eligible are shown), and click **Search** to display a list of available services . You can use the Category and Service Type selections to narrow the search. The Service Title box will match all titles containing the text in the box, for the selected Funding Stream.

Click on an item in the list to place the client into the selected service.

Funding Stream:*

Category:

Service Type:

Service Title:

16 records found.

Funding Stream	Service Type	Service Title	Line Code
WIA-Adult	Employment Plan	Work w/ client to develop job search plan	N2
WIA-Adult	Employment Plan	ISS/IEP Review & Update Session	N2
WIA-Adult	Employment Plan	Initial ISS/IEP Development Session	N2
WIA-Adult	Short Term Prevocational Training	Short-term Prevocational Training - Generic	N6
WIA-Adult	Short Term Prevocational Services	Short-term Prevocational Services - Generic	NP
WIA-Adult	Relocation Expenses	Relocation Expenses - Generic Item/Vendor	NR
WIA-Adult	Internship/Cooperative Experience (Adult)	Internship/Cooperative Exp (Adult) - Generic	14
WIA-Adult	Work Experience (Adult)	Work Experience - Generic	01
WIA-Adult	Comprehensive Assessment	1-on-1 Counseling - In-depth assessment session	NA
WIA-Adult	Comprehensive Assessment	Group Counseling - Assessment results reviewed	NA
WIA-Adult	Comprehensive Assessment	1-on-1 Counseling - Assessment results reviewed	NA
WIA-Adult	Other Case Management Services	Budget Counseling for training	N1
WIA-Adult	Other Case Management Services	Budget Counseling - General	N1
WIA-Adult	Other Case Management Services	Work w/ client to customize LMI research	N1
WIA-Adult	Counseling and Career Planning	1-on-1 Counseling - Customer Crisis/Issue	N4
WIA-Adult	Counseling and Career Planning	1-on-1 Counseling and Career Planning	N4

Done Internet

Step 6: Once you select “1-on-1 Career Counseling”, you will go to the activity screen. You must complete all asterisk and then click “Save” button on bottom of page.

https://www.trackone-in.com - ClientTrack.NET - Microsoft Internet Explorer

TrackOne @Work Solutions

Lidria Romero - Indy WIA Training [Help Topics](#) [About DB1](#) [Logout](#)

Use Home **Case Management** [Add New Client](#) [Find Client](#)

Srednik, Princess
111-11-1111
12/25/1980

Case Management

- Client Home Page
- Reminders/Tasks
- Edit Participant
- Work History
- Enrollment and Application
- Services
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File Review

WIA Activities-Master

Activity

To add an activity, enter the following information.

Begin Date:*

Activity/Service Title:*

Funding Stream:

Line Code:

Service Type:

Provider:

Training Provider ID:

O*Net Code:

O*Net Title:

Summary Description:

Status:*

Planned End Date:*

Actual End Date:

Record Created By:

Service Notes A notes field is provided for any justification, rationale or detailed information necessary for monitoring purposes. Please use accordingly. Notes in this field will be viewable by all users.

Service Notes:

Historical Data

O*Net Code (read-only):

Client Intake Site:

Provider Name:

Case Mgr Name:

Office Name:

WSA:

Total Hours:

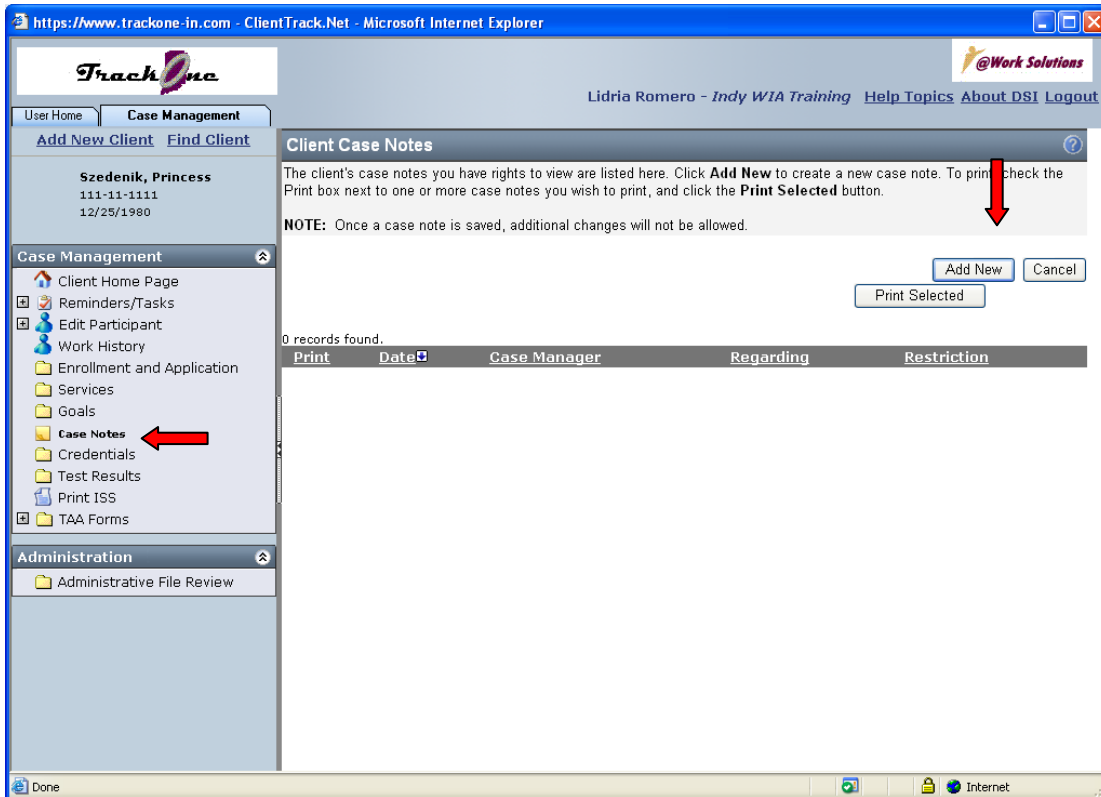
Total Obligated:

Total Expended:

Created Date:

I. Record Initial Service Case Note in Track One

Step 1: Click “Case Note” folder on left. This will take you to the “Client Case Note” screen shown below. Click “Add New” complete all asterisks at top.



Step 2: Enter your case note. The case note will need to include, at a minimum, the information listed in the example. Example: **Met with customer (or name of customer) and administered the initial skills indicator assessment to determine basic skills in language and math. Based on results and discussion, services beyond Core are needed to obtain/retain self-sufficiency employment. I am referring them to Career/Skills Team.** Click “Save” button.

